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WORLD COTTON-CROP ESTIMATE REVISED DOWNWARD

World cotton production in 1946-47 is estimated at 21,500,000 bales (of 500 pounds gross), compared with 20,650,000 bales in the preceding year, and a prewar (1935-36/1939-40) average of 31,000,000 bales. This year's crop is the smallest in 23 years. The current crop did not reach earlier expectations largely as a result of unfavorable weather conditions in the United States and in the Southern Hemisphere. Crops in the latter areas were just being planted when the last world estimate of 22,050,000 bales was released by this Office on November 4, 1946.

An indicated increase of about 4 percent in world acreage from 56,420,000 acres in 1945-46 to 58,480,000 in 1946-47 was shared by nearly all the major-producing countries, with negative results in some cases because of lower yields resulting from unfavorable weather. The greatest percentage increases in acreage were reported in Egypt, Brazil, and the Soviet Union.

Cotton support prices and loans offered by the Governments of all the major-producing countries except China and many of the minor countries, remained in effect for the 1946-47 season, but were generally inactive except for extra long staple in Egypt, because market prices were considerably higher.

Cotton acreage in the United States in 1946 was increased by 374,000 acres, or 2.2 percent above the 17,241,000 acres (harvested) in 1945, despite unfavorable conditions at planting time in the principal cotton areas. Excessive rain and cool weather during the planting season, followed by heavy boll-weevil infestation, were chiefly responsible for reduced yields in most of the central and eastern cotton States. In parts of Texas and Oklahoma, drought in the early part of the season, followed by excessive rain, caused lower yields.

Yield per acre averaged 235.3 pounds in 1946 compared with 253.6 pounds in 1945 and an average of 260.8 pounds for the previous 5 years.

The 18,316,000 acres planted in 1946 were considerably less than the official goal of 20.2 million acres announced early in the year. The goal for the 1947 acreage is placed at 23.1 million acres.

The decrease in cotton acreage in Mexico, from 904,000 acres in 1945 to 843,000 last year, was attributed to a reduction in the Laguna district where drought and insufficient supplies of water for irrigation were detrimental at planting time. A reduction of 138,000 acres in this district was partly offset by increases in other areas, particularly around Matamoros, where 57,000 additional acres were planted in 1946.

COTTON: World acreage and production by continents and countries, average 1935-39, annual 1943-46

Continent and country	Acreage					Production a/				
	Year beginning August 1					Year beginning August 1				
	Average 1935-39	1943	1944	1945 b/	1946 b/	Average 1935-39	1943	1944	1945 b/	1946 b/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
North America:										
El Salvador	7	34	32	24	27	5	19	16	11	17
Guatemala	-	-	7	-	-	2	-	4	3	3
Mexico	725	1,010	963	904	843	334	515	472	434	460
Nicaragua	9	4	4	5	1	5	3	3	4	1
United States	27,788	21,652	20,009	17,241	17,615	13,149	11,427	12,230	9,015	8,640
British West Indies	20	16	16	-	-	5	3	4	3	-
Haiti	-	-	-	40	25	22	13	11	11	6
Puerto Rico	2	10	-	-	-	1	2	1	2	-
Total North America c/	28,647	22,785	21,078	18,240	18,533	13,523	11,984	12,741	9,483	9,131
Europe:										
Bulgaria	85	48	48	57	80	35	8	11	10	22
Greece	168	90	80	67	127	65	12	34	27	46
Italy	56	58	37	34	41	21	11	9	9	12
Rumania d/	8	77	110	128	102	2	12	22	20	11
Spain	46	129	148	90	159	10	21	27	7	23
Yugoslavia	8	-	15	-	-	3	-	-	-	-
Total Europe (excluding U.S.S.R.) c/	372	418	439	387	524	136	69	108	75	118
U.S.S.R. (Europe and Asia)	5,087	-	2,865	2,995	3,200	3,430	-	-	1,700	2,240
Asia:										
Cyprus	11	7	7	-	-	3	2	2	1	2
Iran	442	297	290	303	198	171	78	81	92	65
Iraq	53	28	18	25	25	11	3	2	2	3
Syria	93	35	40	43	49	31	16	13	20	24
Turkey	667	618	644	572	690	275	246	272	251	-
Afghanistan	-	-	-	-	-	49	20	-	20	-
Burma	428	387	-	226	134	97	90	85	32	17
China (includes Manchuria)	7,038	5,400	5,600	6,300	6,500	2,855	1,500	1,600	1,820	1,930
French Indochina	36	-	-	-	-	6	8	-	-	-
India e/	24,204	21,086	14,843	14,478	15,000	4,643	4,401	2,996	2,900	3,000
Korea	564	776	752	705	-	180	205	228	163	90
Netherlands Indies	27	-	-	-	-	9	7	11	-	-
Philippine Islands	5	15	40	10	10	1	3	8	2	2
Siam	16	-	-	-	-	7	-	-	17	-
Total Asia (excluding U.S.S.R.) c/	33,802	28,884	22,865	22,905	23,238	8,344	6,596	5,348	5,340	5,471

South America:										
Argentina	770	913	887	813	f/ 979	289	553	332	285	360
Brazil	5,562	6,200	6,000	5,000	5,500	1,956	2,700	1,626	1,350	1,575
Colombia	98	124	-	-	-	23	26	30	-	-
Ecuador	40	39	-	17	17	13	8	8	7	10
Paraguay	111	104	119	124	160	40	72	40	44	57
Peru	428	326	326	346	346	384	310	325	329	296
Venezuela	50	69	58	-	-	11	16	16	18	-
Total South America c/	7,061	7,777	7,557	6,497	7,200	2,716	3,685	2,377	2,063	2,345
Africa and Oceania:										
Anglo-Egyptian Sudan	439	319	347	332	336	248	175	290	204	226
Belgian Congo	874	-	863	-	865	172	141	175	174	190
Kenya	-	-	-	-	-	13	14	13	4	4
Nyasaland	84	-	-	-	-	12	7	7	8	8
Tanganyika	-	-	-	-	-	50	32	35	35	34
Uganda	1,477	1,234	1,072	1,146	1,233	281	160	228	191	229
Egypt	1,821	740	885	1,020	1,259	1,893	740	962	1,082	1,210
French Equatorial Africa	390	-	667	-	-	40	79	102	115	-
French Morocco	1	8	7	4	-	g/	2	3	2	2
French West Africa	-	-	-	-	-	29	14	21	-	-
Mozambique	-	-	-	596	-	h/ 33	94	92	96	105
Nigeria	-	-	-	-	-	36	21	13	31	-
Angola	73	-	-	-	-	13	23	29	20	-
Australia	53	16	7	8	6	11	6	1	2	2
Total Africa and Oceania c/	6,179	5,116	5,071	5,396	5,785	2,839	1,516	1,976	1,989	2,195
Total World	81,148	68,080	59,875	56,420	58,480	30,988	25,350	24,150	20,650	21,500

Compiled from official sources, publications of The International Institute of Agriculture, and credible trade sources, and includes estimates by this Office.

a/ United States production in bales of 500 pounds gross (480 pounds net); others in bales of 478 pounds net through 1945 and 480 pounds thereafter.

b/ Preliminary.

c/ All subtotals include rough estimates for minor-producing countries not listed above and allowances for other figures not available.

d/ Figures from 1943 to date are not comparable with prewar figures because of boundary changes.

e/ Production figures apparently do not include estimates of unpressed cotton consumed by Indian mills and cotton consumed in hand-spinning industries, usually amounting to a combined total of 600,000 to 800,000 bales.

f/ Planted area.

g/ Less than 500 bales.

h/ Exports.

Production rose slightly from 434,000 bales in 1945 to 460,000 in 1946, despite the decline in acreage. Favorable weather conditions except in Laguna resulted in some improvement in average yields from 238.2 pounds per acre in 1945 to 269.4 pounds in 1946. The rise in yields was shared by all the major cotton-growing areas. In the Laguna district, average yields of 286.4 pounds in 1945 and 356.9 in 1946 were still the highest in the country although total production was exceeded in 1946 for the first time by that in the Matamoros district. When cotton acreage in the Laguna district was reduced in 1946, the best land was reserved for cotton, resulting in a higher average yield per acre.

Production on the European Continent, estimated at 118,000 bales in 1946, was only 18,000 bales or 13 percent below the prewar (1935-39) average. The pressure for cultivation of food crops was somewhat lighter in 1946 than in 1945. Increased cultivation of cotton was also encouraged by most of the governments concerned as a means of conserving meager sources of exchange. Competitive food crops are produced in surplus quantities in most of the cotton areas and farmers found it more profitable to grow cotton at high internal prices fixed by the government than to grow surplus food crops for export.

In the Soviet Union an official report stated that cotton from the 1946 crop in the possession of Government-collection centers at the end of November 1946, was equivalent to nearly 2,240,000 bales (of 500 pounds gross) representing an increase of 32 percent over the 1945 crop of 1,700,000 bales. The acreage was increased only 7 percent but the yield per acre was increased by 20 percent to 334 pounds in 1946.

Annual production during 1943-45 amounted to only half the prewar average as land was diverted to food crops and shortages of labor, draft power and fertilizers were experienced. A sharp drop in yields during the war was attributed mainly to the shortage of fertilizers. The 5-year expansion program for cotton establishes a goal of 4,164,000 acres (3,478,000 acres irrigated) and 4,575,000 bales for 1950. This represents a considerable increase in average yields and is based on plans to expand irrigation systems and to use greater quantities of fertilizers. The acreage goal for 1950 is below the 1934-38 average of 5 million acres by 17 percent while the production goal is higher than the average of 3,000,000 bales by about 50 percent.

Weather conditions in India were generally favorable for cotton crops in 1946-47, especially at harvest time. Preliminary government estimates indicate that 1946-47 acreage and production were around 3,000,000 bales (of 500 pounds gross) from less than 15,000,000 acres or roughly equivalent to the figures for 1945-46.

The 1946 crop of 1,930,000 bales in China (including Manchuria) was about 110,000 bales larger than in 1945, but represented only 68 percent of the 1935-39 average. Acreage figures for the war years are based on incomplete information and may be revised in the next report on world acreage and production. Average yields in China in 1945 and 1946 were only 138 and 142 pounds, respectively, compared with an average of 194 pounds for 1935-39.

Weather conditions in 1946 were not considered favorable for cotton crops, but were generally better than in 1945. Insect pests were detrimental and fertilizers remained scarce. The increase in acreage was attributed primarily to the urgent need for cotton goods in China and the expectation of higher prices for cotton after the removal of controls in former enemy-occupied areas.

Production in north China was increased by 13 percent, despite considerable abandonment of acreage as a result of civil disturbances, adverse weather conditions, and other causes. In central China a production gain of 10 percent was reported although a much larger increase was expected. Acreage expansion in this area was limited by shortages of seed, fertilizer and labor. Acreage in Manchuria was reduced by about 74 percent from 600,000 acres in 1945 to 155,000 in 1946. The decline in production from 160,000 to 70,000 bales was only 56 percent, due mainly to the retention of the more favorable producing areas in cotton cultivation. The reduction in acreage is attributed to removal of controls formerly maintained by Japanese authorities.

The Chinese Government is making an effort to stimulate increased production of cotton through distribution of new seed and the provision of loans for producers. Important cotton areas in north China, however, are still under guerrilla control with limited opportunity for movement of cotton to mill centers and little expansion is expected under prevailing conditions.

In Korea the 1946 crop of 90,000 bales was little more than half of the 1945 crop of 163,000 bales and only 39 to 47 percent of production in previous war years under Japanese control. Cotton acreage was reduced in favor of higher-priced food commodities. Since about half of the crop is normally consumed in hand spinning and other home industries, only about 5 percent of the 1946 crop reached the commercial spinning mills.

Production in Iran, Iraq, Burma, Syria, and other minor-producing countries in Asia remained far below the prewar level because of extension of the wartime practice of diversion of cotton land to urgently needed food crops. In Turkey, however, no such diversion was reported during the war and the 1946 crop was reported to be larger than the 1945 crop of 251,000 bales. The 690,000 acres planted in 1946 represents an increase of 21 percent over the 1945 acreage and is slightly higher than the prewar average.

Brazil's 1946-47 cotton crop (still being picked in south Brazil) is tentatively placed at 1,575,000 bales, compared with 1,350,000 in 1945-46. The Sao Paulo crop, normally representing 75 to 80 percent of the total, is officially estimated at 1,057,000 bales for 1946-47, an increase of 257,000 bales over the previous crop. Private estimates range from 920,000 to 1,015,000 bales. Heavy rainfall, beneficial in the early part of the growing season, lasted throughout the growing period and well into the harvest period, causing excessive plant growth, lower yields and damage to the open bolls. The preliminary estimate of increased production is based on an estimated increase of 10 to 12 percent in acreage. The shift from food crops back to cotton was encouraged by a decline in prices of food commodities in relation to cotton and the favorable cotton-loan rates offered by the Government.

Production in north Brazil, a large part of which is perennial (tree) cotton gradually declined in the past two decades to about 475,000 bales in 1941-42 and has varied little from that level in recent years. Production in minor-producing states of south Brazil usually amounts to 60,000 to 80,000 bales annually.

The area planted to cotton in Argentina was increased by 53,000 to 979,000 acres in 1946-47, but the full effect of the increase was not realized because of unfavorable conditions, that is, drought at planting time, followed by excessive rain and insect plagues, almost as detrimental as similar conditions existing a year ago. The harvested area is usually 6 to 8 percent below planted area and as much as 11 percent in years of extremely adverse conditions.

The first official estimate placed the 1946-47 crop at 360,000 bales, an increase of 75,000 above the crop of a year ago, but considerably less than the record crop of 553,000 bales picked in 1943-44. This year's estimate is 10,000 bales less than current consumption requirements and carry-over on February 28, 1947, was down to approximately 200,000 bales. There was no shifting of cotton land to food crops during or since the war. Acreage followed an upward trend and wide fluctuations in production were due almost entirely to changes in weather conditions.

The 1946-47 crop in Peru was recently estimated at 296,000 bales, compared with 329,000 in 1945-46. Acreage remained the same at 346,000 acres. Yields were reduced by cool, cloudy weather and insect plagues in the central valleys, shortage of water for irrigation in the Ica Valley and severe drought in northern Peru where the Pima variety is grown.

Cotton acreage was restricted by 20 percent in 1942 under the terms of a cotton purchase agreement with the United States which was terminated December 31, 1945. Acreage restrictions were extended to the 1945-46 crop in order to maintain food production at a level necessary for domestic requirements. Extension of the restrictions into the current season was not mentioned in reports from Peru, although acreage remained at the restricted level of recent years.

A 23-percent increase in acreage in Egypt from 1,020,000 acres in 1945 to 1,259,000 in 1946, resulted in an increase of only 12 percent in production to 1,210,000 bales (second estimate) in 1946. Reduced yields were attributed to high flood water and cotton leaf-worm damage.

Cotton acreage restrictions are still in effect because of the need for food production, but have been moderated substantially from the low wartime levels. The maximum acreage permitted by law in 1942, 1943, and 1944, was 773,000 acres, only 42.4 percent of the 1935-39 average of 1,821,000 acres. This was raised to 1,086,000 acres for 1945, 1,088,000 for 1946, and 1,105,000 for 1947. Official acreage estimates indicate that the area planted in those years remained within the prescribed restrictions except in 1944 and 1946 when the total quotas were exceeded by 112,000 and 171,000 acres, respectively.

In the schedules of support prices offered by the Government since 1940, the premiums offered for the longer staple varieties were sufficiently high to cause a larger proportion of total acreage to be devoted to these varieties, especially Karnak. These premiums have been lowered for the 1947 crop and a substantial shift to shorter staple varieties is expected this year.

There was little change in acreage or production in the Anglo-Egyptian Sudan. The 1946-47 crop of 226,000 bales and 336,000 acres were slightly larger than last year's figures but were 8.9 percent and 23.5 percent, respectively, below the average for 1935-36/1939-40, indicating a higher-than-normal yield per acre in 1946-47. The entire surplus remaining from the 1946-47 crop as of January 15, 1947, was purchased by the Government of India at a price equivalent to 35.4 cents per pound for AR (best) quality, BP-52 f.o.b. warehouse in Bombay. During the war years, sales of the cotton crops were guaranteed at a minimum price by the British Government and more than half of each crop was usually exported to India.

Cotton acreage in British East Africa (Uganda, Tanganyika, and Kenya) was increased in 1946-47 by about 7 percent over the 1945-46 figure but it represents only 81 percent of the average for 1935-36/1939-40.

Weather conditions in Uganda, where 80 to 85 percent of the crop is produced, were very unfavorable this year. Heavy rains fell during the picking season and the presence of cotton stainers was widespread, causing reduced yields and below-average quality of the fiber. In the areas affected worst, some cotton fields were plowed under before picking was completed in order to plant food crops.

Early reports placed the 1946-47 crop in Uganda at 229,000 bales, making a total of 267,000 for all East Africa, compared with 230,000 bales last year. More recent reports, however, indicate that the Uganda figure for 1946-47 may be substantially reduced in the final estimate. The British Government has underwritten the sale for export of all East African cotton since the early war years, but a major portion of it was exported to India each year.

Detailed information from the Belgian Congo is lacking, but statistics indicate that cotton acreage and production were maintained in recent years at or above the prewar level, despite some reports of a labor shortage resulting from increased activity in mining and other war industries. The 1946-47 crop of 190,000 bales is the highest since 1942-43 and exceeds the prewar average of 172,000 bales.

Cotton production in Portuguese African colonies (Mozambique and Angola) was nearly tripled during the war years, and the entire crop was exported to Portugal each year. Production in Mozambique rose from an average of 33,000 bales for 1935-36/1939-40 to 96,000 in 1945-46 and a near-record crop of 105,000 bales in 1946-47. Production in Angola rose from a prewar average of 13,000 bales to 20,000 in 1945-46 and further expansion was encouraged by the Government this year.

In French Equatorial Africa, production more than doubled during the war years to 115,000 bales in 1945-46, and further increases are planned under Government sponsorship.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, Chairman, C. M. Purves, A. W. Palmer, P. K. Norris, C. H. Barber, O. K. Moore, R. T. Moyer, and Lazar Volin.

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